

A PROFILE OF THE
OTTAWA CENTRAL AREA

Data Summaries and Comparisons with the National Capital Region

Community Development Department
Planning Branch
Information Division
City of Ottawa

March, 1984

I - Introduction

This research report presents a brief narrative on growth trends in the Ottawa Central Area. Socio-economic data are described and interpreted for the National Capital Region (NCR). The share of the Ontario side of the NCR (which is also called the Ottawa-Carleton Region) is next calculated, followed by estimations for the Ottawa Central Area.

Data description, trend analysis, and conclusions are in point form and are based on the attached 3 tables which contain detailed data. As the main purpose of this research report is to highlight the Central Area in the context of the National Capital Region, numbers have been rounded and approximations have been used wherever appropriate. Further, an attempt has been made to adjust and update the different data elements to March, 1984 in order to present the current overview of the Central Area.

The primary sources of information in this report are the Planning Branch's 3 computer systems called:

- 1 - Central Area Data Bank
- 2 - Development Information System
- 3 - The SCOPE Model

Massive census data from Statistics Canada, Economic Council of Canada, as well as field data collected by the Planning Branch, make up the different data bases for these systems. More detailed information may be obtained by contacting:

Statistical Unit
Information and Operations Division
Planning Branch
Community Development Department
City of Ottawa
111 Sussex Drive
Ottawa, Ontario
K1N 5A1
(613) 563-3181.

II - Population

A - Historic Trends

- o The National Capital Region's population has grown from 626,000 in 1971 to 769,000 in 1984. This results in an annual growth rate of approximately 11,000 or 1.8%.
- o For the Ottawa-Carleton Region, the corresponding figures are 471,500 in 1971, 580,600 in 1984; an annual growth of 8,400 or 1.8% (the RMOC's population has historically been around 75% of the NCR's).
- o Approximately $\frac{1}{3}$ of the annual growth in the RMOC is from migration induced by employment opportunities.
- o The Central Area's population declined from 10,750 in 1971 to 9,700 in 1976. Since then, it has grown to 10,400; an increase of 700 or 7.2% in 8 years or an annual increase of 0.9%.
- o The Central Area population of 10,400 makes up 1.3% of the Capital Region's population. This figure also includes 7,500 foreign diplomats, MPs, students, and other non-residents.
- o One in 5 residents in the Central Area is over 65 years of age which, at 20%, is the highest concentration of senior citizens in any part of the NCR.
- o The average household size in the Central Area is 1.5 persons which is the smallest in the NCR.
- o Out of every 5 households in the Central Area, 3.5 are childless households including 2.8 single-person households. These are the largest statistics for any area within the entire NCR.

B - Projections

- o The National Capital Region's population is projected to grow at an annual rate of 9,200 to 11,000 or 1.2 to 1.4% to the year 2001. Total population would therefore be 925,000 to 955,000 by 2001.
- o The RMOC's annual growth is projected at 5,000 to 12,000 or 0.8% to 2.0%. This would bring the total population to:

595,000	652,000	by	1986
618,000	705,000	by	1991
663,000	782,000	by	2001

- o The Central Area's population is anticipated to grow at the rate of 2.0% during the next several years. Long-term growth, however, is not expected to be as significant.

III - Employment

- o There are presently 338,000 jobs and an unemployment rate of 8.7% in the NCR.
- o 45% of these jobs are in the public sector, 40% are in related services, and 15% are non-federal private sector jobs.
- o Over 270,000 or 80% of all jobs are located in the RMOC which has an unemployment rate of 7.0%.
- o Almost 1 out of 5 jobs in the NCR is located within the Central Area which contains a total of 65,200 jobs (19.3% of the total). This would be increased to 70,000 as soon as the recently completed building projects are occupied.
- o The Central Area's employment level has increased significantly during the last 3 years with the Rideau Centre complex adding over 2,000 jobs in 1983. Moreover, almost all 100% of the Central Area jobs are in the office, retail, and institutional sectors.
- o Approximately 50% of the Central Area employees are female and this is the highest concentration of female workers within the NCR.

IV - Office Space

- o Total office space in the NCR is estimated at 30 million square feet.
- o The RMOC's share is 22 million square feet or 73%.
- o An estimated 20 million square feet of all office space is in the City of Ottawa.
- o A total of 16.5 million square feet or 55.0% of the NCR's office space is located within the Central Area.
- o Since 1970, the Central Area has absorbed an average of 600,000 square feet of office space per year. Future absorption is estimated at $\frac{1}{2}$ million square feet annually.
- o There is presently a market vacancy rate of approximately 5% for office space in the Central Area. Furthermore, a total of 1.4 million square feet of new space is under construction or recently completed, making the total supply sufficient for the next 3-4 years.
- o The present commercially zoned vacant and developable land in the Central Area totals 2 million square feet. With a Floor Space Index of 8, potential new floor space is 16 million square feet which could house a minimum of 40,000 additional employees.
- o Redevelopment potential is also significant in creating additional space. Therefore, the Central Area could easily accommodate more than 100,000 full-time employees.

V - Retailing

- o All the shopping centres and retail strips, including those in the downtowns of the municipalities within the NCR, make up 16.3 million square feet of retail facilities of which 11.4 million square feet or 70% are in the RMOC.
- o The total retail economy in the NCR is 3.51 billion dollars \$2.62 billion or 75% of which is spent in the RMOC.
- o The Central Area's share of retail space within the NCR had been marginally growing during 1960-1982 but its market share had been significantly declining:

Market Share	Year
47%	1961
40%	1966
27%	1971
21%	1978
20%	1982

- o With the entry of the Rideau Centre and the associated retail establishments, both the space and the market share of the Central Area have increased:

Central Area's retail floor space share in 1984: 22.1%
Central Area's retail market share in 1984: 21.4%

Furthermore, it is anticipated that the CA's market share will increase to 25% of the NCR as the Rideau Centre becomes well established.

- o Total retail space in the Central Area is 3.6 million square feet and this is equivalent to six (6) shopping centres the size of Bayshore.

VI - Tourism

- o There are approximately 7,000 hotel and motel rooms in the NCR accommodating an estimated 2.5 million tourists annually. This is the highest number of tourists on a per capita basis in the nation.
- o Total tourist contribution to the NCR economy is over \$380 million which provides approximately 20,000 jobs. The RMOC's share of this economy is \$305 million or 80%.
- o Approximately 4,300 of all hotel-motel rooms and the majority of the NCR's tourist attractions are located in the Central Area. The Central Area's share of the tourist economy is therefore estimated to be a minimum of \$183 million or 60% of the total.
- o The Central Area's tourist facilities, programmes, and planned activities are rapidly growing, making the future tourism prospects excellent.

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Attach.

TABLE 1

HISTORIC AND PROJECTED POPULATION

Area	1971	1976	Changes Numeric %		1984	Changes (76-84) Numeric %		PROJECTIONS					
								Annual Growth (84-2001)					Source and Date
								1986	1991	2001	Numeric	%	
National Capital Region	626,000	702,200	76,200	12.2	769,000	66,800	9.5	788,000	832,000	955,000	10,940	1.4	City of Ottawa, 1981
								808,000	851,000	925,000	9,175	1.2	CMHC, 1981
Ottawa-Carleton Region	471,500	520,500	49,000	10.4	580,600	60,100	11.6	625,000	---	760,000	10,500	1.8	Teiga, 1976
								595,000	618,000	663,000	4,850	0.8	Teiga, 1979
								596,000	621,000	646,000	3,850	0.7	
								652,000	705,000	782,000	11,850	2.0	RMOC, 1980
								593,000	615,000	718,000	8,100	1.4	City of Ottawa, 1981
Ottawa-Central Area	10,750	9,700	-1,050	-9.8	10,400	700	7.2		N.A.		N.A.		N.A.

Note: A population of 14,000 has been added to the figures for 1984-2001 to account for foreign diplomats, non-resident MPs and students.

TABLE 2

STATISTICS FOR 1984

No.	Characteristics	Geographic Area			
		National Capital Region (NCR)	Ottawa-Carleton Region (RMOC)	Ottawa Central Area (CA)	CA's Share of NCR
1.	Total Population resident population hotel guests diplomats, students, etc.	769,000 755,000 4,500 9,500	580,600 568,000 3,600 9,000	10,400 3,800 2,800 3,800	1.3% 0.5 62.2 40.0
2.	No. of Dwelling Units	278,600	213,500	3,100	1.1
3.	Employment Levels (No. of Jobs)	338,000	270,300	65,200	19.3
4.	Unemployment Rates	8.7%	7.0%	---	---
5.	Retail Floor Space (million sq. ft.)	16.3	11.4	3.6	22.1
6.	Retail Sales (billion dollars)	3.51	2.62	0.75	21.4
7.	Office Space (million sq. ft.)	30.0	22.0	16.5	55.0
8.	Tourist Economy (million dollars)	380.0	305.0	183.0	60.0

Under construction and near completion in the Central Area

Centennial Building (400 Laurier Avenue) 370,000 sq. ft.
 Gilin Plaza (234 Laurier Avenue) 400,000 sq. ft.
 Metlife II (50 O'Connor Street) 500,000 sq. ft.
 81 Metcalfe 54,000 sq. ft.
 Atrium in the Market 130,000 sq. ft.

Total

1.4 million sq. ft.

Development Potential in the Central Area

Existing commercially zoned vacant land 2 million sq. ft.
 X 8 FSI

 16 million sq. ft.

at an average of 400 sq. ft. per employee ---> 40,000 new jobs

Redevelopment potential should also be estimated and added.

Note: Unemployment rates refer to the month of January, 1984.

TABLE 3
CENTRAL AREA DATA BANK: SUMMARY, 1983

CENSUS TRACT NO.	LOCATION	NO. DWELLING UNITS	NO. HOTEL ROOMS/SUITES	NON - RESIDENTIAL TENANTS																(2)	No. OF PARKING SPACES						
				RETAIL						OFFICE						TOTAL (1)											
				OCCUPIED FLOOR SPACE (MILLION GROSS SQ. FT.)	VACANT FLOOR SPACE (MILLION GROSS SQ. FT.)	VACANCY RATE	EMPLOYMENT			OCCUPIED FLOOR SPACE (MILLION GROSS SQ. FT.)	VACANT FLOOR SPACE (MILLION GROSS SQ. FT.)	VACANCY RATE	EMPLOYMENT			OCCUPIED FLOOR SPACE (MILLION GROSS SQ. FT.)	VACANT FLOOR SPACE (MILLION GROSS SQ. FT.)	VACANCY RATE	EMPLOYMENT								
							FULL-TIME	PART-TIME	SQ. FT./ EMPLOYEE (3)				FULL-TIME	PART-TIME	SQ. FT./ EMPLOYEE				FULL-TIME	PART-TIME	SQ. FT./ EMPLOYEE						
48 & 54	Central Area	3,100	4,300	3.3	0.3	8%	7,000	4,000	370	15.7	2.3	12.8 %	51,000	2,000	300	24.2	2.8	10.4 %	62,000	6,400	370	2	07	7,700	10,000	700	18,400

NOTES: (1) INCLUDES ALL OTHER NON-RESIDENTIAL TENANTS (i.e. RETAIL AND OFFICE PLUS INSTITUTIONAL AND MANUFACTURING).

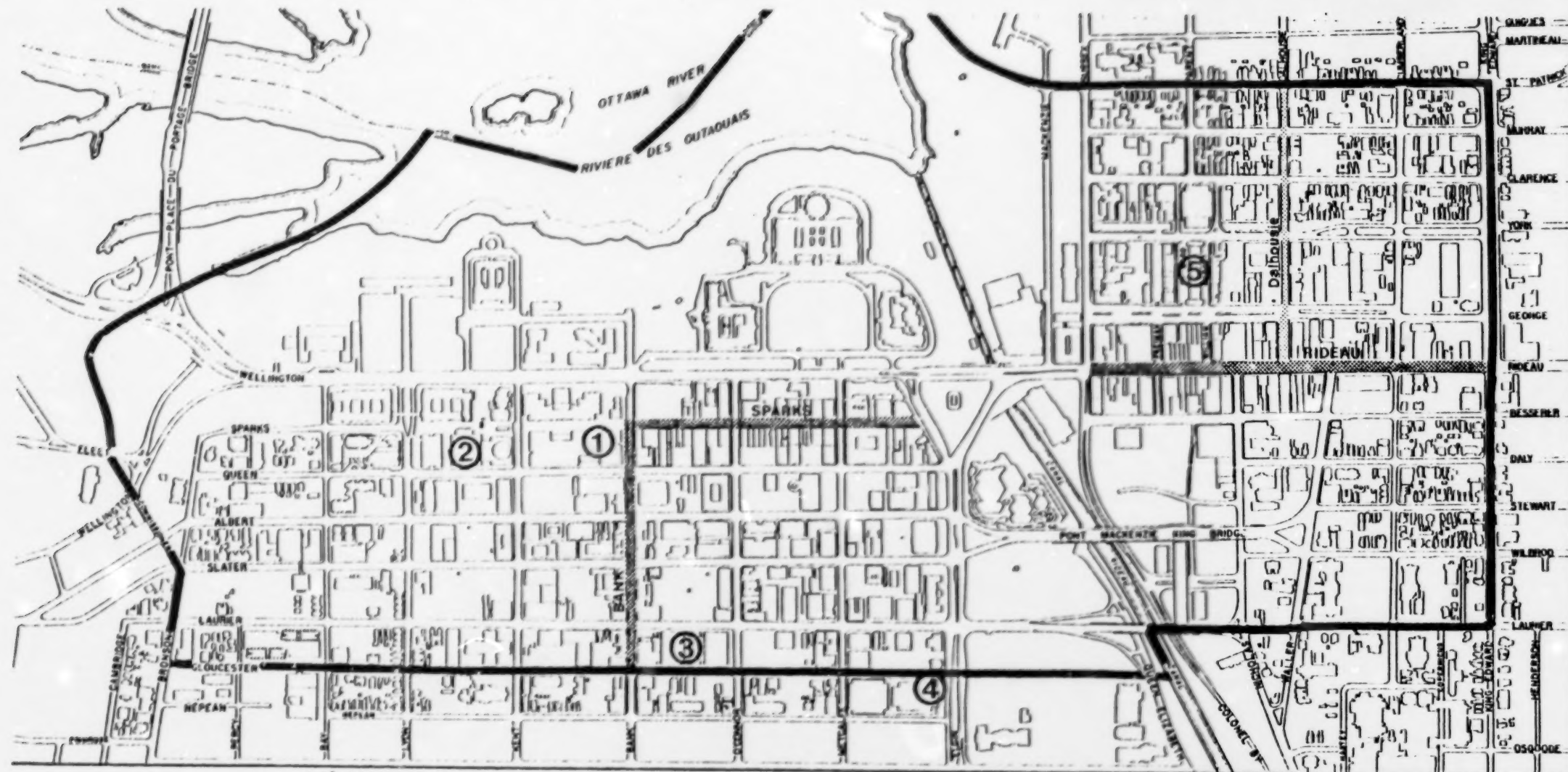
(2) ALL VACANT DEVELOPABLE LAND INCLUDING LAND USED FOR SURFACE PARKING. (designated parks, river banks, and permanent open spaces are not included)

(3) CALCULATED BASED ON 2 PART-TIME EMPLOYEES = 1 FULL-TIME.

ALL FLOOR SPACE FIGURES ARE GROSS.

NUMBERS MAY NOT ADD TO TOTALS DUE TO ROUNDING.

SOURCE: CENTRAL AREA DATA BANK, SEPTEMBER, 1983 - PLANNING BRANCH, CITY OF OTTAWA.



Ottawa Central Area Aire centrale

- ①
- ②
- ③
- ④
- ⑤

Major Retail Strips

- 240 Sparks
- Place de ville
- L'Esplanade Laurier
- Place Bell Mall
- The Byward Market

City of Ottawa-Ville d'Ottawa
Community Development-Planning Branch
Développement Communautaire-Section d'urbanisme
Technical Services Division
Division des services techniques

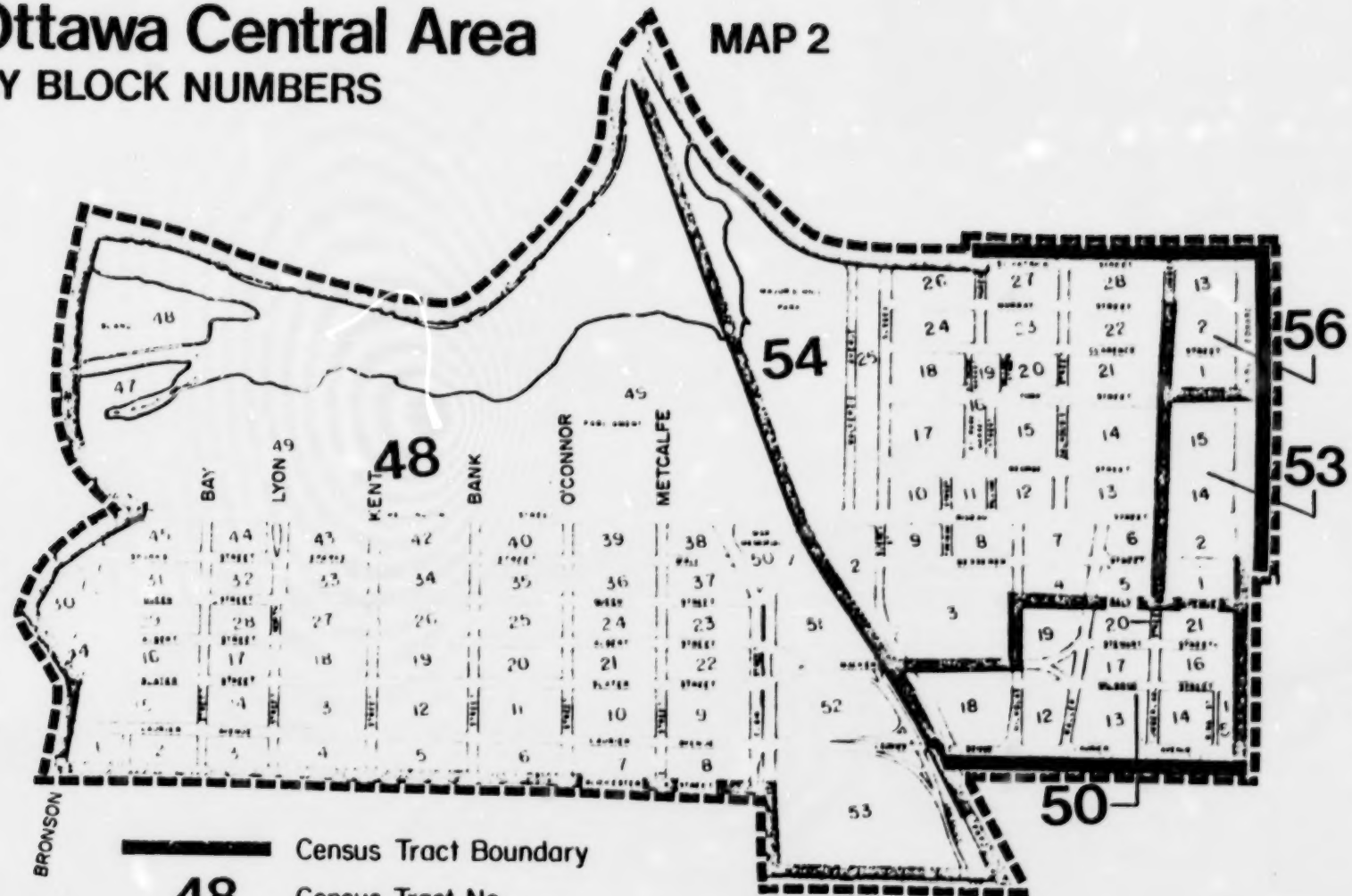


Drawn by-Dessiné par: W. Clouthier
Date-March-mars 1979 PB 818
Scale-Echelle: 1:50,000
January
Janvier
1980
Sroblowski
Révisé par: Révisé

MAP 1

Ottawa Central Area BY BLOCK NUMBERS

MAP 2



POOR

QUALITY

ORIGINAL

